# Outbound Contact Expert User's Guide

Outbound Contact eXpert 8.6.0

4/8/2024

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# Overview

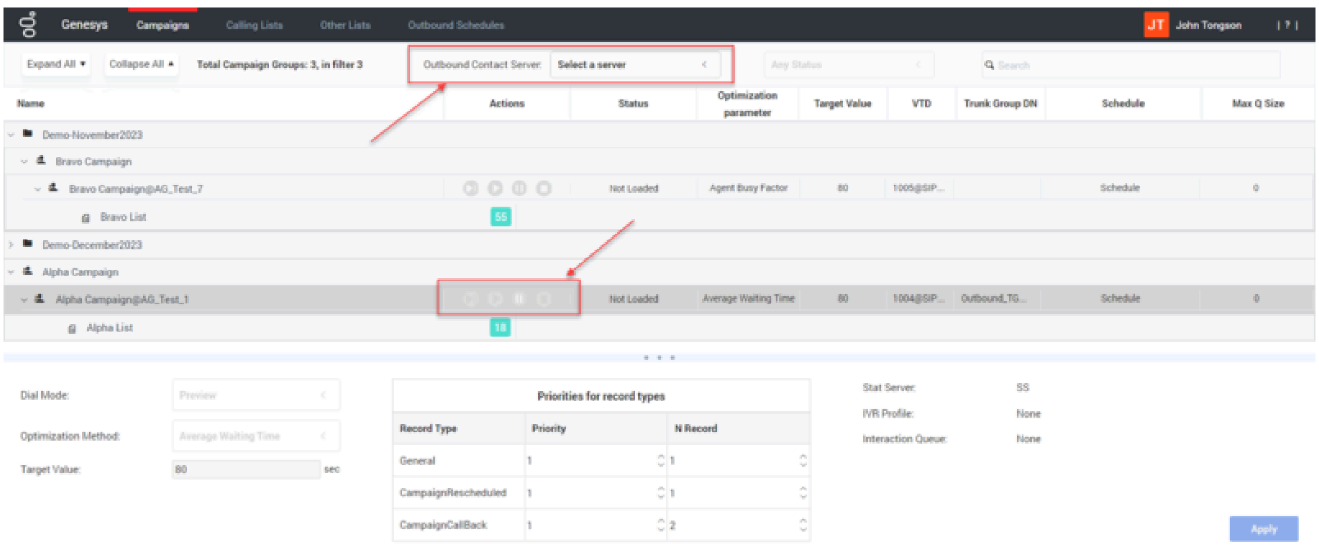
Outbound Contact eXpert (OCX), helps the Outbound Administrators to run Campaigns, operate on Calling Lists, and configure Outbound Schedules. It has the following modules:

- Campaigns
- Calling Lists
- Other Lists
- Outbound Schedules

# Campaigns

A Campaign is a flexible master plan that organizes Calling Lists and Agent Groups (or Place Groups) for dialing calls and handling call results. A Campaign can be assigned to multiple Campaign Groups. Campaign Groups are structures for organizing and managing an automated process of making outbound calls to the destinations specified in Calling Lists. Campaigns page lists all the campaign templates, campaign groups, and contact lists available in the system. The assigned weight label appears next to the name of the contact list.

To view and manage Campaigns in a specific server, select the server in the **Outbound Contact Server** drop-down above the list.




Use the media controls next to each campaign group to start, pause, or stop dialing activity.

- Load - Load the Campaign Group.
- Start - Starts or resumes dialing.
- Pause - Pauses dialing activity.
- Unload - Unloads the Campaign Group.

## Warning

Unloading Campaign Group resets all campaign group statistics.

The following search and filter functions are available on the Campaigns page:

| | |
|---|---|
| Expand/Collapse | Click Expand All to view all campaigns, associated campaigns groups, and their calling lists.<br><br>Click Collapse All to hide all campaign groups and contact lists associated with each campaign Group. |
| Search box | Enables you to search the campaigns dashboard for any value within a campaign, campaign group, or contact list. |
| Any Status | Enables you to filter the list of campaigns by the status of the campaign group. Options are as follows:<br>• Any Status<br>• Not Loaded<br>• Active<br>• Running<br>• Waiting Unload<br>• Unload in Progress<br>• Unknown or Error |

For each Campaign group, the following properties are displayed:

- **Dial mode**: The name of the Dialing Mode for the selected Campaign Group.
- **Optimization Method**: A method to optimize direct dialing algorithms in the predictive dialing modes. The methods include: Agent Busy Factor, Average Waiting Time, and Overdial Rate.
- **Target Value**: The target value for the optimization method. The unit of measure depends on the optimization method in the Optimization Method field.
- **Priorities** for record types: If you are defining a Load, Start, or Set Dialing Mode action, specify the Priority and N Records for each record type listed.
    - Priority: The priority for this record type. A value of 1 is the highest priority; 0 (zero) means do not dial. The recommended priority values are 0, 1, 2, or 3.
    - N Records: The number of records of this type to fetch from the buffer for dialing. A valid value is any positive number or 0. 0 (zero) means do not dial.
- **Stat Server**: The name of the Stat Server to which the Campaign group is connected.
- **IVR Profile**: IVR Profiles are voice (VoiceXML), call control (CCXML), announcement, or conference applications that specify the unique service information required as this application executes within the Genesys Voice Platform.
- **Interaction Queue**: Interaction Queues are Script objects used by Interaction Server to handle outbound interactions in Push Preview Dialing mode. OCX allows you to set the following dial modes:

| Dial mode | Description |
|---|---|
| Predictive | Dials calls from a calling list and predicts agent |

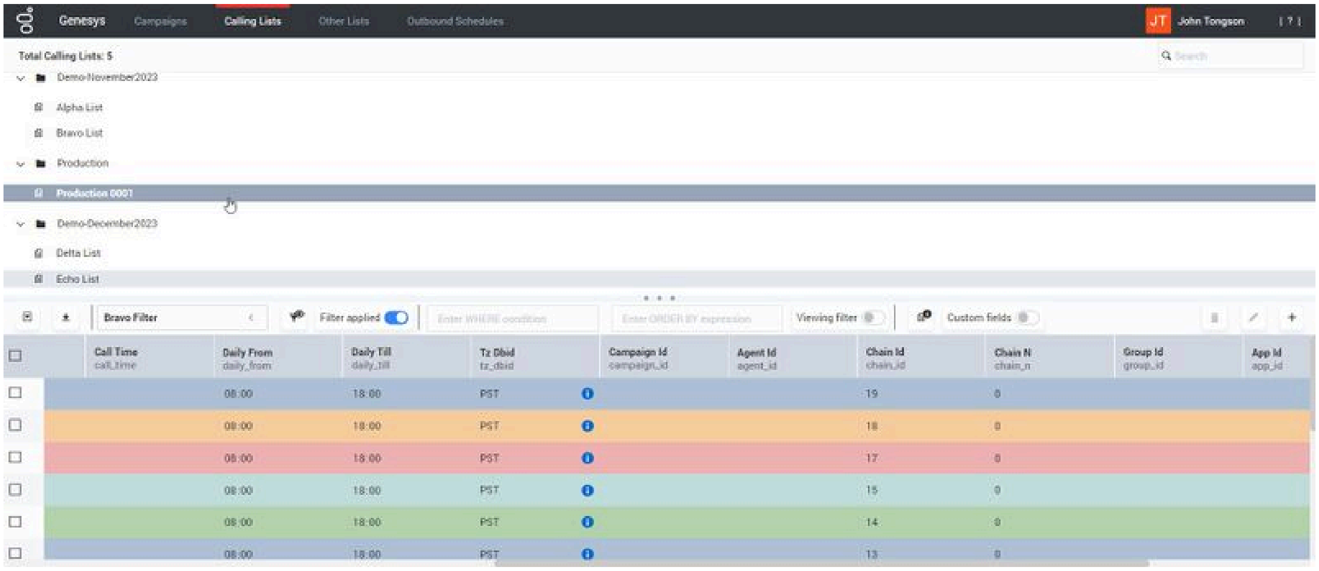
| Dial mode | Description |
| --- | --- |
| | availability. Recommended for high-volume, low-value Campaigns. |
| Preview | Dials calls from a calling list only when an agent previews a calling list record and manually requests a call to be dialed. Recommended for low-volume, high-value applications, where individual ownership of accounts is the highest priority. |
| Progressive | Dials calls from a calling list only when an agent is available. Recommended for low-volume, high-value Campaigns. |

## Important

Changing the dial mode and optimization method in OCX is temporary. It lasts only until the Campaign is stopped or you change the setting. To change from Predictive or Progressive Dialing mode to Preview Dialing mode, the Campaign must be stopped and restarted.

# Calling Lists

Calling lists are database tables with records that store a collection of phone numbers and other customer and business-related data. Calling lists are created in Genesys Administrator Extension, and inherit their structure from the assigned format. The lower section of the Calling Lists view lists all of the records and their associated fields included in the respective calling lists.




## Importing a Calling List

You can import a Calling List from a .csv file.

To import calling lists, the source and destination files must meet all of the following requirements:

- The source file or list and the destination Calling List should have the same format.
- The source list and destination Calling List are stored in different database tables of the same database. (This avoids creating duplicate records when two or more Calling Lists share the same database table.)
- Database tables for both the source list and the destination Calling List can be located on different databases, but they must have the same type of Database Management Systems.

To import a Calling List from a .CSV file:

1. Click Import file.
2. In the **Import File** dialog box, click Browse and select a calling list.
3. Select the **Import Mode**. The following import modes are available:
   - Append Only: Adds records from the source list into the destination list. If duplicate records are

found, the imported record is dropped and the existing record remains. Duplicate records are two records that have the same values in all Primary Key fields (by default, it is the chain_id and chain_n fields).

- Append and Update: Adds records from the source list into the destination list. If duplicate records are found, the imported record overwrites the existing record. Duplicate records are two records that have the same values in all Primary Key fields (by default, it is the chain_id and chain_n fields). If no duplicate records are found, then the record from the calling list is inserted as a new record in the destination calling list.
- Flush and Append: Deleted the existing list and adds records from the source list.

4. Click **Yes**.

## Exporting a Calling List

OCX allows you to export a Calling List to a .CSV file.

To export the Calling List:

1. Select the Calling List you need to export.
2. Click Export the calling list.
3. The .CSV file will be downloaded to your system Downloads folder.

## Operations on Calling Lists

Apart from importing and exporting Calling Lists, you can perform the following operations on the records:

| | |
|---|---|
| Filter drop-down | Allows you to select the dialing filter to be applied to the Calling List, that defines which call records within the calling list table will be dialed by the campaign. These filters created in Genesys Administrator Extension. |
| Filter data | Provides the following information about the filter:<br>• List Format Id<br>• Filter Name<br>• Format name<br>• Criteria<br>• Order |
| Apply Filter | When the toggle is turned on, the filter (WHERE and ORDER BY parts) are applied to the calling list and result is shown in the lower portion of the user interface. |

| | |
|---|---|
| Enter WHERE condition | A SQL statement that defines the restricting conditions for the records in the calling list. |
| ORDER BY | The sort order of the records that meet the restrictions by the SQL statement in the WHERE text box. |
| Viewing Filter | When the toggle is turned on, the filter (WHERE and ORDER BY parts) are applied to the calling list and result is shown in the lower portion of the user interface. Viewing filter does not affect the dialing and is used as a tool to browse the required set of records in the user interface. |
| List information | Provides the following information of the calling list:<br>• Table access name<br>• Format name<br>• Database name<br>• Campaign Groups |
| Custom fields | When selected, displays only user-defined fields. When not selected, displays mandatory fields of the calling list. |
| Delete record(s) | Deletes the selected record(s) from the Calling List. |
| Edit record(s) | Updates field values for selected record(s) in the Calling List.<br>Select one or more records (consecutively or randomly) from the list, click the Edit record(s) option, and change the Field values as required. When you click Save, the changed field values for the selected records are updated.<br>Note: Do not modify records in a Calling List while a Dialing Session for a Campaign is loaded or running because data may be lost. |
| Insert new record | Specify a value for each field for this record and click Save, the record is added to the Calling List. |
| Pagination controls | Allows you to set the number of records per page, refresh the records, and move between pages. |

# Other Lists

## Do Not Call List

In Outbound, a list of customers who request not to be called is known as a Do Not Call (DNC) list. The DNC data in a Do Not Call list file includes the customer's phone number or a customer ID. OCX allows you to perform append and delete operations on the Do Not Call list.

To append entries to the list:

1. Click on the Do Not Call list (gsw_donotcall_list).
2. In the Do Not Call list dialog, click Append entries.
3. Select the **Import Mode**. The following Import Modes are available:
   - Append Only: Adds records from the source list into the destination list. If duplicate records are found, the imported record is dropped and the existing record remains.
   - Append and Update: Adds records from the source list into the destination list. If duplicate records are found, the imported record overwrites the existing record. Duplicate records are two records that have the same values in all Primary Key fields (by default, it is the chain_id and chain_n fields). If no duplicate records are found, then the record from the calling list is inserted as a new record in the destination calling list.
4. Click **Browse** and select the .CSV file where you have list to append.
5. Click **Import**. The list will be appended to the existing Do Not Call list.

To delete entries from the list:

1. Click on the Do Not Call list (gsw_donotcall_list).
2. In the Do Not Call list dialog, click Delete entries.
3. Select the **Delete Mode**. The following Delete Modes are available:
   - Delete all entries: Allows you to clear all the entries in the list.
   - Delete external entries: Allows you to delete only external Do Not Call entries.
   - Delete entries from file: Allows you to delete entries created from a file.
4. Click **Delete**. The entries will be deleted from the Do Not Call list.

## Request Log

The Request Log table, gsw_request_log, stores outbound dialing activity for reporting, auditing, and other purposes. This table is created in Genesys Administrator Extension. OCX opens the gsw_request_log table for a particular tenant when the dialing session for the first Campaign/

Campaign group for this tenant is loaded.

# Outbound Schedules

Outbound schedules are Script objects used to run Dialing Sessions. These scripts are specific to the Outbound Contact Solution, and must be of type Outbound Schedule. The Outbound Schedules page allows you to define the schedule for a Dialing Session.

To create an Outbound Schedule:

1. Go to **Outbound Schedules** menu.
2. Update the information for the fields provided in the below table:

| | |
|---|---|
| Name | The name of the Schedule. This field is mandatory. Specify a name that is unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). |
| Any OCS | Allows you to select Outbound Contact Server that will execute this Outbound Schedule. Selecting Any OCS denotes that this Outbound Schedule will be executed by all Outbound Contact Servers. In deployments with a pair of primary and backup Outbound Contact Servers, select either Any OCS or the name of the primary Outbound Contact Server. |
| Define recurrence of the Outbound Schedule section | Allows you to define the recurrence for the schedule. The following options are available:<br>• Daily - The Schedule runs on a daily basis.<br>• Weekly - The Schedule runs on a weekly basis.<br>• Monthly - The Schedule runs on a monthly basis.<br>• Once - The Schedule runs only once on the specified date. |
| Start Condition section | Allows you to specify how often and when the Schedule is to recur. This section has different options depending on the recurrence type you have selected:<br>• Repeat every - Enter the frequency of how often the Schedule run, and enter the time in the time selector. Enter the frequency of how often the Schedule run, and enter the time in the time selector.<br>  ◦ For Daily Schedules, the default value = 1 (every day).<br>  ◦ For Weekly Schedules, the default value for frequency is 1 (every week), and you must |

| | |
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| | specify one or more days of the week.<br>• For Monthly Schedules, the default value for frequency is 1 (every month), and you must specify one or more days of the month. Note: This field does not appear for Schedules of recurrence Once.<br>• From - The date on which the Schedule is to start running.<br>• Until - A future date to specify when the Schedule is to stop running. Note: This field does not apply to Schedules of recurrence Once<br>• at - Allows you to specify the time when the schedule should be started |
| Stop conditions section | Allows you to specify when the Schedule should stop. The following options are available:<br>• Stop at - Time when the Schedule should to stop running.<br>• Stop after - Time after when the Schedule should stop after running for a specific amount of time. Enter this time in hours (maximum 28) and minutes (maximum 59). |
| Expand/Collapse | Click **Expand All** to view all campaign groups associated with each campaign template.<br>Click **Collapse All** to hide all campaign groups and contact lists associated with each campaign template. |
| Add Campaign Group | Allows you to add a Campaign Group to the Schedule. |

3. Click **Create in root folder** to create the Schedule in the root folder.